



U.S. Small Business Administration

The Patriot Express Initiative Loan

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Your small business resource.

Helping small businesses
start, grow and succeed.



SBA's Patriot Express Initiative has new and enhanced programs and services for veterans and members of the military wanting to establish or expand small businesses.

HELPING THE MILITARY COMMUNITY WITH BUSINESS



Patriot Express Initiative Loan

Can be used for:

- Start-up
- Expansion
- Equipment purchases
- Working capital
- Inventory purchases
- Business real-estate purchases



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Loans up to \$500,000 for military community members, including:

- Veterans
- Service-disabled veterans
- Soon-to-be discharged active-duty service members eligible for the military's Transition Assistance Program
- Reservists and National Guard members
- Current spouses of any of the above
- The widowed spouse of a service member or veteran who died during service or of a service-connected disability

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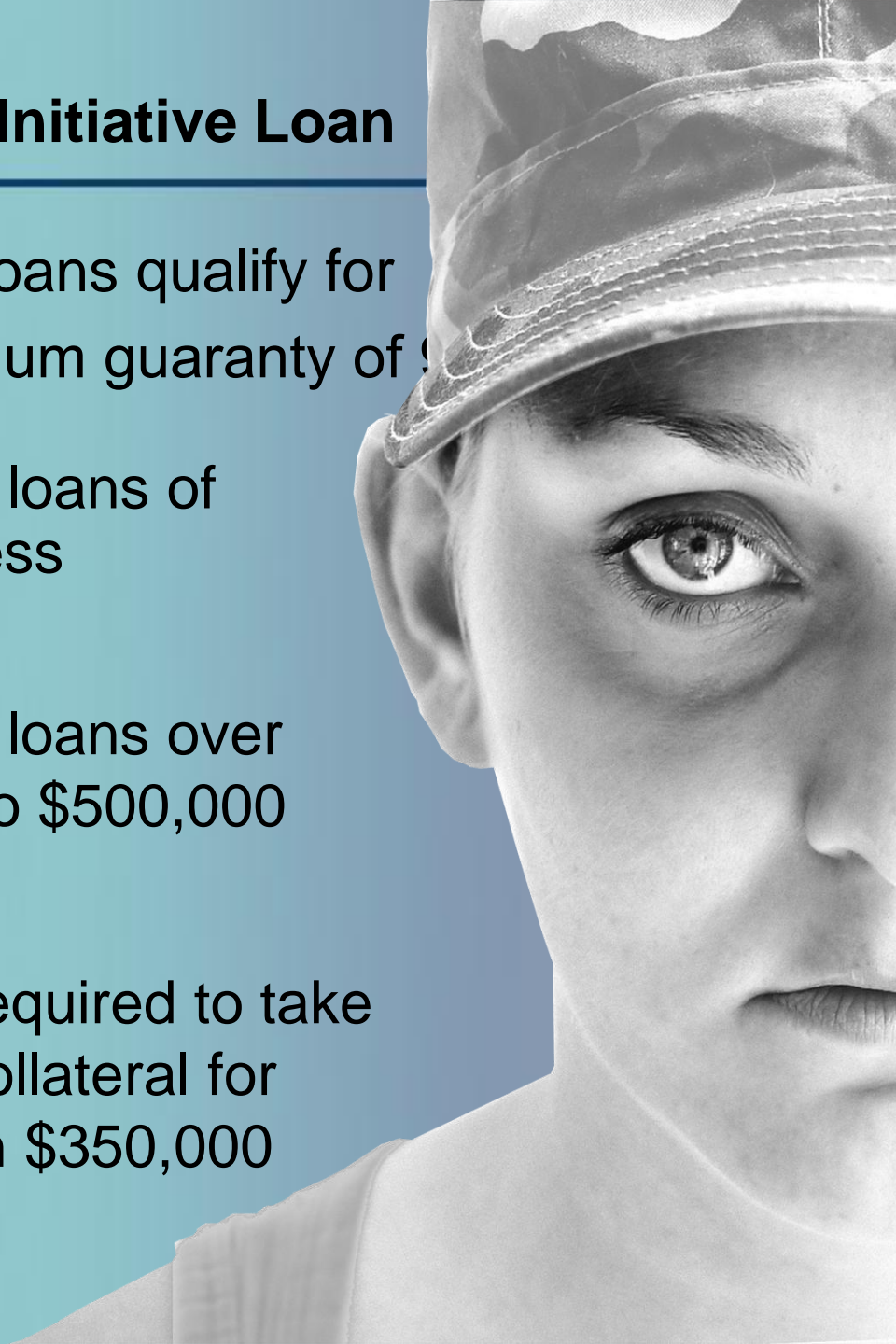
Patriot Express loans qualify for the SBA's maximum guaranty of \$

- 85 percent for loans of \$150,000 or less
- 75 percent for loans over \$150,000 up to \$500,000
- Lenders are required to take all available collateral for loans between \$350,000 and \$500,000

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Patriot Express Initiative

Your SBA

For more information about SBA's small business resources and the Patriot Express Initiative, go to:

www.sba.gov

or

www.sba.gov/patriotexpress/index.html

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Military Reservist Economic Injury Disaster Loan

- The purpose of the Military Reservist Economic Injury Disaster Loan program (MREIDL) is to provide funds to eligible small businesses to meet its ordinary and necessary operating expenses that it could have met, but is unable to meet, because an essential employee was "called-up" to active duty in their role as a military reservist. These loans are intended only to provide the amount of working capital needed by a small business to pay its necessary obligations as they mature until operations return to normal after the essential employee is released from active military duty.

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Military Reservist Economic Injury Disaster Loan

- The Filing Period for small businesses to apply for economic injury loan assistance begins on the date the essential employee receives a notice of expected call-up and ends 1 year after the essential employee is discharged or released from active duty.

(NOTE: This program applies to military conflicts occurring or ending on or after March 24, 1999)

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OPENING

small business opportunities



federal government contracting



U.S. Small Business Administration **SBA**

DOORS



LEGISLATIVE HISTORY

- 1999 Veterans Entrepreneurial Act and Small Business Development Act of 1999 (PL 106-50)
- 2003 Veterans Benefits Act (PL 108-183)
- 2004 Executive Order 13360
- 2006 Veterans Benefits, Health and Technology Act (PL 109-461)

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ELIGIBILITY

- The SDV must have a service-connected disability that has been **determined by the Department of Veterans Affairs or DOD**
- The SDVOSB concern must be **small** under the NAICS code assigned to the procurement
- The SDV must **unconditionally own 51%** of the SDVOSB concern
- The SDV must control the management and **daily operations** of the SDVOSB concern
- The SDV must hold the **highest officer position** in the SDVOSB concern

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SET ASIDES

A contracting activity may not make a requirement available for a SDVO contract if:

1. The requirement would be fulfilled through award to **Federal Prison Industries, Inc.** or to **Javits-Wagner-O'Day Act** participating non-profit agencies for the blind and severely disabled.
2. The requirement is currently being performed by an 8(a) participant or SBA has accepted that requirement for performance under the authority of the **Section 8(a) Program.**

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SET ASIDE

A Contracting Officer (CO) may set-aside requirements if:

1. The requirement is **not exempted** from SDVO contracting.
2. The contracting officer **considers** setting aside the requirement for **8(a), HUBZone, or SDVOSB concern participation** before considering setting aside the requirement as a small business set-aside.
4. There is a reasonable expectation that **at least two** responsible SDVOSB concerns will submit offers; and
5. The award can be made at a **fair market price**.

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Set Aside

A CO may award a sole source contract if:

1. The requirement is **not exempted** from SDVO contracting and **cannot be set-aside**.
2. The CO **does not** have a reasonable expectation that at least two **responsible** SDVOSB concerns will submit offers.
3. The anticipated award **price** of the contract, including options, will **not exceed**:
 - \$5.0M for manufacturing requirements
 - \$3.0M for all other requirements
4. Award can be made at a **fair market price**.

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JOINT VENTURES

- SDVOSB concern and one or more other business concerns may submit an offer on a competitive procurement so long as each concern is small under the size standard assigned to the NAICS code corresponding to the contract provided:
 - revenue base - Procurement exceeds half the size standard to the NAICS assigned to the contract
 - Employee base - procurement exceeds \$10,000,000

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SIZE

- For sole source and competitive SDVOSB concern procurements that do not exceed the thresholds
 - The joint venture will be considered affiliated
 - Combined average receipts or employees must meet the size standard.

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OTHER FACTORS OF THE JOINT VENTURE

- SDVOSB concern must be the managing partner
- Employee of the SDVOSB concern must be project manager
- 51% of profits distributed to SDVO
- Specify responsibilities of the parties
- Obligate all parties to ensure performance
- Final records kept by SDVOSB concern
- Performance of work IAW 13CFR124.510
- Contract execution in the name of the JV

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Veterans Benefits, Health Care and Information Act PL 109-461

- Pertain only to the Department of Veterans Affairs
- Priority/preference: SDVOSBC, VOSBC
- Conditions Met
- Register in WWW.VetBiz.Gov
- Be able to award on a fair and reasonable assurance.
- May award sole greater than \$100K to \$5,MM
- Achieved goal SDVO 12.09% and VOSBC 15.27% in FY 2008.

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